

Azure AD Application Id		<input type="checkbox"/>	<input type="text" value=""/>	
Azure AD Login at startup		<input checked="" type="checkbox"/>	On <input type="radio"/> Off <input type="radio"/>	
Azure AD Tenant		<input type="checkbox"/>	<input type="text" value="puzzel.com"/>	
Azure AD Use agent e-mail as login hint		<input checked="" type="checkbox"/>	On <input type="radio"/> Off <input type="radio"/>	
Azure AD Use Microsoft identity platform (v2.0) [A]		<input type="checkbox"/>	On <input checked="" type="radio"/> Off <input type="radio"/>	

CRM tab configuration

For the Dynamics CRM to work within Puzzel, Admin users must activate the CRM chat and CRM Voice options in the Admin Portal as shown below.

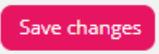
To enable the options, do the following:

1. Login to the Admin Portal.
2. On the Main Menu, navigate and click on the Widget option.



3. Select Tab Configuration.
4. Scroll down to CRM Chat and CRM Voice tab options in the list.
5. Select the access level to enable these options [User/user group/Company].
6. Click on the check box and select on.

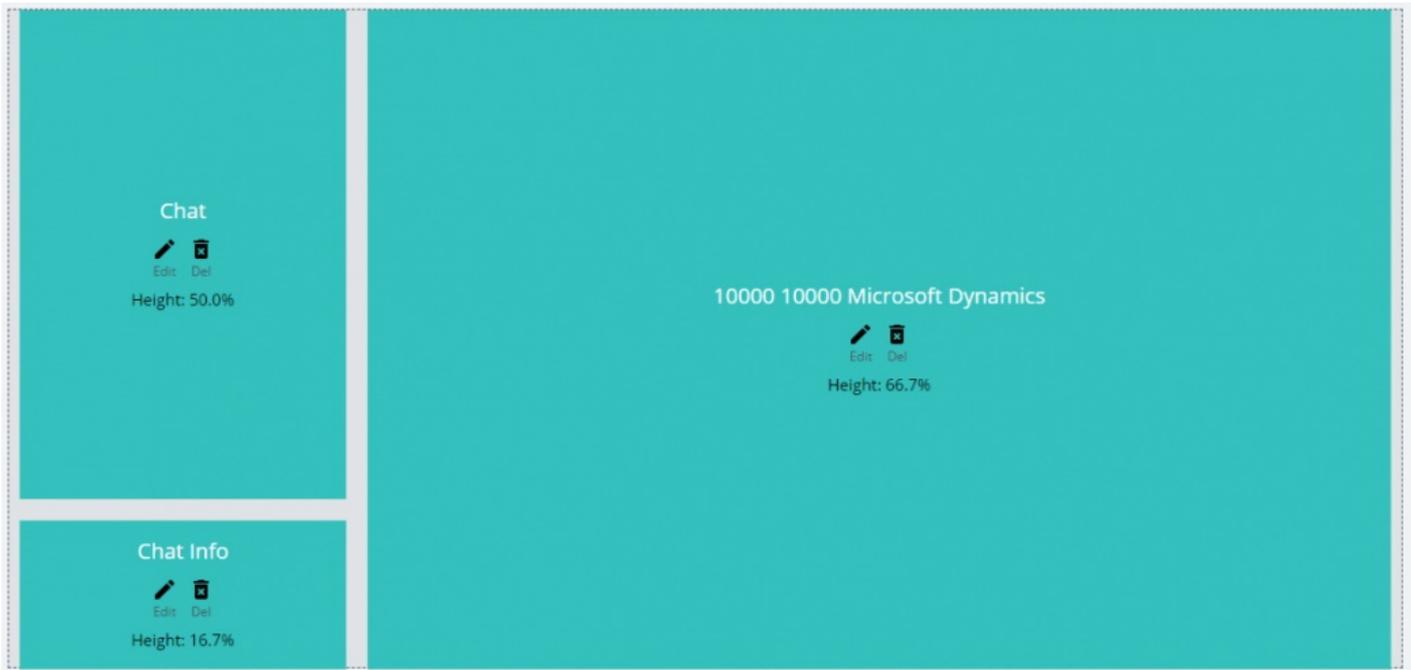
CRM Chat		<input type="checkbox"/> On <input checked="" type="radio"/> Off	<input checked="" type="checkbox"/>	On <input type="radio"/> Off <input checked="" type="radio"/>	<input type="checkbox"/> On <input checked="" type="radio"/> Off
CRM Voice		<input type="checkbox"/> On <input type="radio"/> Off <input checked="" type="radio"/>	<input checked="" type="checkbox"/>	On <input type="radio"/> Off <input type="radio"/>	<input type="checkbox"/> On <input checked="" type="radio"/> Off

7. Save the changes by clicking on the  button.

To make the CRM chat and voice tabs to be the default tab to pop up when the agent receives a call or chat request, you need to deactivate the standard Phone and Chat tabs for the user. To do that, search for Phone and Chat tabs from the list and deactivate it.

Chat	<input type="checkbox"/> On <input type="radio"/> Off <input checked="" type="radio"/>	<input type="checkbox"/>	On <input type="radio"/> Off <input checked="" type="radio"/>	<input type="checkbox"/> On <input type="radio"/> Off <input checked="" type="radio"/>
Phone	<input type="checkbox"/> On <input type="radio"/> Off <input checked="" type="radio"/>	<input type="checkbox"/>	On <input type="radio"/> Off <input checked="" type="radio"/>	<input type="checkbox"/> On <input type="radio"/> Off <input checked="" type="radio"/>

You can now customize the Voice and chat tabs so that they contain the CRM widget. Refer to the Widget documentation for more details on setting up custom tabs.



Note

Remember to disable the default phone and chat tab, e.g. Phone (voice) tab, remember to set the Event to SYSTEM_INCOMING_CALL

Customise filters for search

You can customise the criteria for automatic search of contacts and accounts in the admin portal. For example: Phone number from which the customer is calling can be used when accepting requests from a voice channel. Alternatively, you could use email id as the criteria to search for records when accepting email or a web chat request.

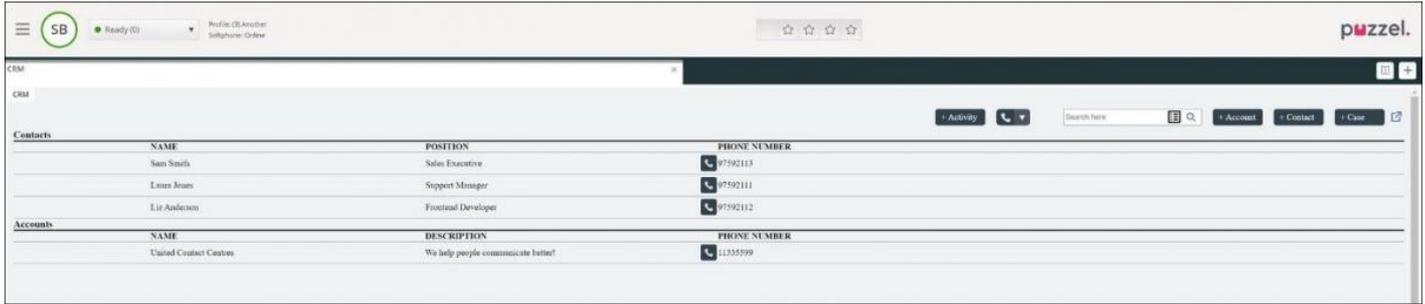
Furthermore, you can customise what properties of contacts/accounts to display in the multiple match view.

To customize the above in the admin portal, go to Widget-> Widget Configuration->Microsoft Dynamics

Microsoft Dynamics		Company	User Group	User
Quick find users/user groups		Inherit	Inherit	Inherit
AccountFilter	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AccountView	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ContactFilter	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ContactView	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Parameter	Description	Value
1 AccountFilter	Criteria used for Account search	\$filter=contains(accountnumber,\${searchvalue}) or contains(emailaddress1,\${searchvalue}) or contains(telephone1,\${searchvalue})
2 AccountView	Properties of Account to display	NAME:name,DESCRIPTION:description,PHONE NUMBER:telephone1

	Parameter	Description	Value
3	ContactFilter	Criteria used for Contact search	\$filter=contains(emailaddress1,\${searchvalue}) or contains(firstname,\${searchvalue}) or contains(lastname,\${searchvalue}) or contains(mobilephone,\${searchvalue}) or contains(telephone1,\${searchvalue})
4	ContactView	Properties of Contact to display	NAME:fullname,POSITION:jobtitle,PHONE NUMBER:mobilephone



Note

The value shown in the above table is only an example representation and can contain any field of your choice.